Project Managers' Advisory Group

MINUTES
May 21, 2007

Attending:

Alisa Cutler	EPMO
Bob Giannuzzi	EPMO
Jesus Lopez	EPMO
Ritchie Barnette	OSC
Barbara Swartz	ITS
Jim Tulenko	ITS
Charles Richards	ITS
Todd Russ	ITS
Vicky Kumar	OSC
Forrest Robson	DOT
Sarah Joyner	ESC
Lynne Beck	DHHS/DMH
LaQuita Hudson	ITS
John Gary	NCCCS
George Fenton	DOJ
Randy Moody	DENR
Lucy Cornelius	DPI
Jim Skinner	DOI

Bob Giannuzzi welcomed everyone to the meeting and asked first-time participants to introduce themselves. **Ritchie Barnette** of OSC introduced himself.

Jesus Lopez reported that the current cycle of the PMP Exam Prep class is wrapping up this week. He indicated that 6 or 7 students have already applied to qualify to take the exam.

Bob called for approval of the April minutes – approved.

NCPMI news was covered next. **Lynn Beck** reported that next month's Public Sector LIG on June 7 is advertised as a roundtable on Speed Dating (PM Version). **John Gary** advised that the May 23 PMO LIG meeting's speaker is from the UNC School of Government. No news on a state employee discount for this year's NCPMI Annual Event to be held on September 13.

Bob Giannuzzi called for updates from the Task Groups.

- *Workflow* **Jesus Lopez** reported that this group is on hold.
- *Status Reporting* **Bob** reported for **Gaye Mays** that very few comments from agencies received; however all are in agreement regarding adding a "jelly bean" for status reporting, most not in favor of a 90 day limit in Initiation. We will continue to review the 90 day issue.
- *PM Tools* **Gaye** via **Bob** reported that a demo of the SAP portfolio product which is part of the XRPM suite took place on May 2. Overall impression was favorable. The Strategic Initiatives group will need to spend the next few months working with our current system and will later this year resume the review process.
- *Methodology* **Alisa Cutler** reported that the proposed Lessons Learned (by phase) template that was circulated last month is being piloted on five projects. Feedback is

due to **Alisa** by 6/5. The Methodology group is also looking at revisions to the Closeout process.

Bob passed out the following information on upcoming teleconferences of interest to the PM Advisory Group.

Organization/website	Contacts	Upcoming Calls
NASCIO http://www.nascio.org/committees/projectmanagement/	Stephanie Jamison 859/514-9148 sjamison@AMRms.com Access 888/272-7337 conference ID 6916986	June 5 (3:00) **Improving the Odds: How Missouri's PM Certification Assures the Odds Favor the House**
PMO Executive Council http://www.pmo.executiveboard.com/	Register at website	May 23 (12:00) **Leveraging the Full potential of Project and Portfolio Management (PPM) Tools**
CIO Executive Council http://www.cio.executiveboard.com/	Register at website	May 31 (7:00 AM) **Tools for Managing ERP Upgrades**
Application Executive Council http://www.aec.executiveboard.com/	Register at website	May 31 (11:00) **Voice of the Customer Requirements Capture** June 14 (6:00 PM) **Structuring and Developing the Business Analyst Role**
Infrastructure Executive Council http://www.iec.executiveboard.com/	Register at website	June 12 (11:00) **Developing Infrastructure Next Generation Staff Competencies**
Information Risk Executive Council http://www.irec.executiveboard.com/	Register at website	June 19 (11:00) **Third Party Risk Assessments**
Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/	Register at website	May 23 (12:00) **Accelerating the SOA Maturity Curve**

Bob asked that the members send **John McShane** a list of people interested in Requirement, RFP, Business Analysis training. He'll compile a list of dates for each based on interest.

Courses will each be in the $850 to $900 per course range. Course duration varies from two to four days.

Jim Tulenko reported that the PPM tool has sustained improved performance since it has been migrated to MS Server 2005. The next new user training is tentatively slated for the week of 6/18. **John Gary** asked if there were plans for advanced training. **Jim** – no. **Sarah Joyner** proposed a Lunch 'n Learn on Change Requests. **Jim** will look into this. Jim then discussed the process by which changes are made to the process:

Proposal => Methodology Group => PPM Change Board

For those that are approved and implemented, Jim sends an email to all PPM licensees to notify of changes.

Bob reported his observation that a high percentage of Yellow projects are from the first monthly status reports, often from PMs' first time ever reporting in the PPM tool. Bob urged that each agency designate another pair of eyes (PM) to review the report. It would also be a good idea to have the assigned PMA review it prior to submission.

Bob discussed excellent examples of RFP sections related to vendor PM deliverables (Thank you, DHHS!). These will be added as file attachments to distribution of these minutes.

Bob distributed a summary of Lessons Learned (attached) of projects completed since the last meeting. **Laquita Hudson** discussed some of those form her Motor Fleet Management project. **Vickie Kumar** suggested that discussion of pertinent LLs from similar projects make for a good agenda item at project kickoff meetings.

Bob closed with a request for thoughts on how project success is celebrated.

Meeting adjourned at 4:06 PM.

Lessons Learned Documentation

Exhibit A

ITS Security Information and Event Management (SIEM) Procurement and Implementation

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

-Confirmed solution selection process as all business requirements were met
-Created repeatable processes for implementation and operations of solution

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

-Increase estimates regarding procurement
-Confirm in-scope and out-of-scope items at all levels

Exhibit B

Department of Administration Motor Fleet Management

Note: the Lessons learned for this project are provided based on feedback from multiple areas which participated in the project implementation including the Motor Fleet customers, ITS Hosting and ITS NCID support.

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

Motor Fleet project customers - Positive situations and lessons learned

Situation	Practice to continue
Team work	Individuals demonstrated dedication to the project, taking ownership of activities and holding themselves and each other accountable for results.
Responsive: situations occurred and the team was able to respond in the nick of time with positive results.	Individuals continue to be responsive to every request. A solution is either identified or information is provided for why something cannot be changed.
Solutions are provided to address business needs. Examples include a manual load of	The system was designed to be open and flexible.

NCAS codes, providing a drop down window to make the process easier, and the ability to batch invoices for priority processing.	
The technical team provided screen samples for the business people during the design phase	The technical team utilized prototypes to enable the users a quick way to see a sample before code was actually created. This method allowed for better design and kept the user active during the design activities.
Customer involvement throughout the project enabled the system design to consider all aspects of the business.	The primary business users were engaged during every phase of the project.
A business subject matter expert (SME) was co-located with the development team during the build and implementation activities	The knowledge made available by having the SME located with the development team allowed the development team to validate test results and correct problems before making presentation for acceptance.
The technical manager was a strong, influential, and experienced leader	The leadership demonstrated by this individual proved very beneficial when the team was challenged by many obstacles.
All external entities identified as contributors and/or recipients of the system were identified and contacted.	Getting buy-in from external entities proved to be a very strategic move for a successful implementation. Meetings were held with these folks during requirements, design and build activities.
Cyclical approval of functional deliverables	The development team identified a method to reduce the amount of time needed to obtain acceptance and mitigated risk for problems during implementation.
The project manager had ITS connections	The project manager assigned to this project was an ITS staff member and was able to facilitate closure to several ITS activities as needed.
Meeting notes were published for every meeting and included action items which were monitored to closure	The meeting notes always included action items with due dates and responsible person making it simple to follow up for results.
The conversion steps were simulated multiple times	This method to simulate the conversion multiple times enabled the development team to identify and resolve problems that would have been encountered during implementation. This method also allowed the team to identify bad data and confirm with the business to cleanse, or how to process the bad data before the final conversion was executed.
Potential road blocks were identified early and alternatives were defined.	Having experienced state employees heading up the development team enabled the team to identify potential road blocks in

	advance and define alternative approaches to avoid them.
The development team was flexible when responding to requests that did not impact the schedule.	Responding to requests that were non-impacting to the schedule or budget helped the user better adapt to changes introduced by the system.
The project had strong overall business representation.	The project will be more successful when business staff are able to work with the project for designated amounts of time and are in positions to make decisions.
The DOA MIS put together a strong team.	The project was identified as high priority for the agency and ensured internal staff members were made available to work on the project.
Good documentation was created and maintained throughout the project life cycle.	The documentation developed with the project initiation continually evolved throughout the project. On multiple occasions the requirements and design documents were referenced to confirm and manage scope.
The technical team gained understanding of the total business functions	The technical team actively engaged with the business team and considered all processes as they designed the new system. This concept enabled the technical team to suggest business process changes that would improve the system implementation.
Sticking to the project schedule	A reasonable schedule was planned and the total project team (business and technical) continued to monitor progress to the schedule.
The agency was able to keep the project as a high priority.	Several competing activities were pulling at resources assigned to the project. Based on the benefits defined for the project the agency continued to keep the project at a high priority to avoid impact to the planned schedule.
Open communication within the team	The project team was managed in an environment with defined standards and rules making it easier for the team to communicate openly.
Team stayed focused	The team had clear objectives and was able to stay focused on accomplishing these.
Meetings were well documented	The meeting notes helped to keep all project participants informed, even when missing a meeting.
Training was successful	The training approach included step by step hands on training by an individual who had worked with the project team beginning to end, and who was a business SME. Because the trainer was a known person to the business folks they felt comfortable

	when in training to ask questions and request additional help when needed.
Transition from old system to new went well.	Direct 1 on 1 support provided to the primary business users immediately after implementation.
Operational Support team is fully equipped to provide production support	The development team consisted of full time state employees who are able to provide solid production support immediately.
Staff for production support requirements.	Identify Production system support requirements early in the project life cycle and recruit to have those resources on board during the development activities.
Project implemented under budget	The budget was planned based on requirements and the project was managed to take advantage of cost reductions when available, such as with staffing temporary positions.
The new system is more cost effective than the old system.	Define operating costs for maintaining current system/processes and compare to projected costs for new system/processes.
The system has been up continually since implementation.	The base system has been up without interruption primarily because of the extensive testing conducted before implementation. The overall system design facilitates controlled change management for fixes that have been required.
System has enabled users to access more information	The system design and infrastructure allows authorized users access to information collected and maintained in the database.
Agencies are able to continually work during the month	The system design accommodates real time updates and does not require total system down time for monthly processes.
All data converted from old system	As a result of repeated conversion loads during development, the team was able to identify and plan how to load information that would not load until format changes were made to meet design of new system.
Data quality issues were managed to minimize impact to the new system	The Motor Fleet team and Agency fiscal folks cooperated and put forth a lot of extra effort to address issues specifically identified with data.
Coding standards consistent	The development team defined coding standards before code activities started and made sure each unit of code met these standards. This practice also enables more efficient support for the production system.
Application design is open and flexible to allow for quick impact analysis of required changes and implement these with little or	Ensure the application design is modular so that specific processes are contained and can be referenced multiple times. This

no impact to production.	design allows for quick impact analysis if a change occurs to a module and also allows for single change to a process which enables quicker validation and implementation of the change.

ITS Hosting - Positive situations and lessons learned

Situation	Practice to continue
Identified issues that needed to be resolved	Willingness for all to work together
Unknown processes for how to engage ITS and oversee activities	Having an internal ITS employee as project manager who could facilitate getting items addressed

ITS NCID - Positive situations and lessons learned

Situation	Practice to continue
Identified a WSDL as a candidate for web service	The Web service was created and is reusable.
Universities and Community Colleges not previously defined in NCID were identified as Motor Fleet Management System Users	Know your users Have plan in place to communicate with these Take ownership of known activities related to NCID registration and approval process Have folks with the right skill sets in place
NCID version 7 was not fully implemented. During the engagement the NCID team was able to identify gaps in the user documentation and the knowledge and skills required to integrate the new release. The NCID team filled the gaps and defined a repeatable process that is continually being improved.	Have technical folks on development team with high aptitude for learning Have responsive NCID support to provide answers and who are open to alternative solutions The application development and NCID support teams worked well together to draft the user documentation
NCID controlled by the TPG Steering Committee. The NCID support team cannot officially implement change or set direction without first getting agreement by this committee.	The team compensated for things out of their direct control in order to mitigate risk. Weekly meetings conducted with development team to identify issues and functions not working, and the application development and NCID support teams worked together to resolve these. Defined a primary plan for integration Defined backup alternatives and decision dates Continually reviewed progress and adjusted plans to accommodate outstanding requirements.
The development activities for the MFMS	The application development team

application and those for the NCID v7 resulted in dynamic changes to both environments.	managed separate environments for dev, pre-prod and prod. The two teams worked together to ensure the application environments pointed to the appropriate NCID environment (dev, pre-prod, prod) and confirmed stability for each when testing.
The NCID support team distributed emails to the MFMS identified as users who were not currently defined to the NCID. There were 2-rounds of this communiqué distributed. The emails from the NCID were effective and generated several inquiries from users. The NCID team was able to successfully address each inquiry.	Stage communication to the users in order to mitigate risk that the user may not acknowledge notice the first time, and to serve as reminder as the implementation date gets closer.
Several users in entities not having NCID prior to the system implementation contacted the NCID and Business with inquiries and concern that they had been incorrectly identified as the NCID delegated admin (DA).	Although this situation may at first appear negative it was actually planned and worked as planned. In many cases the NCID team had not received response from previous inquiries made to entities and did not know who would be the appropriate NCID DA. Taking this course allowed the NCID team to speak with folks in the entity and successfully identify who should be the DA for the specific entity.

Exhibit C

Department of Public Instruction, Comprehensive Exceptional Children Accountability System (CECAS) Initiative

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

   While this project was not always reported on time each month for various reasons, it is clearly noted that if you attempt to accurately report each month the status, major accomplishments, planned for next month, associated dollars and hours spent for each reporting cycle, you will have a much better picture of where your project is and fully documented why the project may be ahead or behind schedule, cost and scope. The tool is set up to definitely help manage the project if done correctly and adequately. We look forward to a much better project reporting cycle with our future CECAS projects.

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

   Trying to manage a program the size of the CECAS under one project was impossible to do and be as effective and efficient as we need to be. As a result in going forward, there will be separate initiatives/projects to include: (1) hosting, (2) maintenance, (3) reporting implementation, (4) requirements definition, and (5) development of enhancements.

In the future, if there is a change in the Project Manager role, a definite transition plan will be developed to allow adequate transition of knowledge and status of the project over to either a new appointed PM or the Enterprise Program Manager in the absence of a newly appointed PM.

Time needs to be allocated each month to allow closer PMO oversight monitoring to occur with status, change management and reporting of responses to issues and risks.

Exhibit D

DENR NC/EPA Central Data Exchange Node Data Flow Implementation

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

Close planning and project monitoring are essential to keeping a project on track. With the remote location of the vendor, weekly phone conference status reviews lead to us being able to catch any design and/or communications issues very early and not let the project stray off course.

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

More effort and attention needs to be in place for code reviews of vendor deliverables.

Exhibit E

ITS Planning/Purchase of Asset Management Software

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

Need thorough planning and research
Need active participation from departments and technical resources

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

None of note

Exhibit F

Department of Health and Human Services North Carolina Time Information Management Effort

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

Having a project methodology and organization structure with clearly defined roles and responsibility were key success factors.

Regular status meetings were key to keeping all team members informed of project issues, upcoming tasks due dates and the time to have open discussions.

Having a project web site and central document storage area for all team members to access for project documents and view upcoming meetings and news information was very helpful.

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

It is very important to the success of the project to involve the subject matter experts in requirements gathering phase of a project. It would greatly improve requirements gathering activities if management would carefully analyze the experience requested to determine the best candidate from their area.

The people that will be designated to an approval capacity need to be both authorized to make a decision and willing to do so.

The communication between project resources and their management chain is critical to ensure that information that needs to be communicated back to management in done so in a timely manner.